

FORM PTO-1449 (REV. 7-80)		U.S. DEPARTMENT OF COMMERCE PATENT AND TRADEMARK OFFICE		ATTY. DOCKET NO.: 53326.000008		SERIAL NO.: 09/520,763	
LIST OF MATERIALS CITED BY APPLICANT <i>SEARCHED JUN 16 2000</i>				INVENTOR'S NAME: Comiskey et al.		EXAMINER: Not yet assigned	
(Use several sheets if necessary)				FILING DATE: 03/08/00		GROUP: Not yet assigned	
U.S. PATENT DOCUMENTS							
*EXAMINER INITIAL		DOCUMENT NUMBER	DATE	NAME	CLASS	SUBCLASS	FILING DATE
	A						
	B						
	C						
FOREIGN PATENT DOCUMENTS							
D	DOCUMENT NUMBER	DATE	COUNTRY	CLASS	SUB-CLASS	TRANSLATION	
						YES	NO
OTHER MATERIALS (Including Author, Title, Date, Pertinent Pages, Etc.)							
<i>DFC</i>	E	U.S. Trust News (visited 6/12/00) < http://www.ultrust.com/news050100.htm >					
<i>DFC</i>	F	citi Welcome (visited 6/12/00) < http://www.citibank.com/domain/navhome.htm >					
<i>DFC</i>	G	Global Corporates and Institutions (visited 6/12/00) < http://www.db.com/central/ver40/index.html >					
<i>DFC</i>	H	S1 Empowering financial institutions to improve their customers' world (visited 6/12/00) < http://www.s1.com >					
<i>DFC</i>	I	How do you get there? (visited 6/12/00) < http://morganonline.com/home.html >					
<i>DFC</i>	J	Spotlight (visited 6/12/00) < http://www.ml.com >					
<i>DFC</i>	K	YourWITAN.com (visited 6/12/00) < http://www.yourwitan.com/home.html >					
<i>DFC</i>	L	VIP Private Capital (visited 6/12/00) < http://www.vipprivatecapital.com/home.html >					
<i>DFC</i>	M	Overview (visited 6/12/00) < http://www.bessemer.com/WebSite/Content/Wealth.../WealthManagement.asp 6/12/00&Graphic=WealthManagement>					
<i>DFC</i>	N	Financial Navigator International (visited 6/12/00) < http://www.finnav.com >					
<i>DFC</i>	O	Financeware.com (visited 6/12/00) < http://fplanauditors.com/default.asp >					
<i>DFC</i>	P	The Burgiss Group (visited 6/12/00) < http://www.burgiss.com >					
<i>DFC</i>	Q	FMC Financial Models (visited 6/12/00) < http://www.fmco.com/fmc/noframes/index.htm >					
<i>DFC</i>	R	Solutions for (visited 6/12/00)< http://www.bankofny.com >					
<i>DFC</i>	S	Market Snapshot: Stocks look to data for direction (visited 6/12/00) < http://www.quicken.com >					
<i>DFC</i>	T	UBS (visited 6/12/00) < http://www.ubs.com/e/private_clients.html >					
EXAMINER <i>Dilma L. Lopez</i>		DATE CONSIDERED <i>8/18/02</i>					
*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609; Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.							

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		LIST OF MATERIALS CITED BY APPLICANT JUN 16 2000 (Use several sheets if necessary)		INVENTOR'S NAME: Comiskey et al.	EXAMINER: Not yet assigned		
				FLYING DATE: 3/08/00	GROUP: Not yet assigned		
U.S. PATENT DOCUMENTS							
*EXAMINER INITIAL		DOCUMENT NUMBER	DATE	NAME	CLASS	SUBCLASS	FLYING DATE
A							JUL 20 2000 RECEIVED
B							
C							
FOREIGN PATENT DOCUMENTS							
D	DOCUMENT NUMBER	DATE	COUNTRY	CLASS	SUB-CLASS	TRANSLATION	
						YES	NO
OTHER MATERIALS (Including Author, Title, Date, Pertinent Pages, Etc.)							
E	Sanwa Internet Banking 2000 (visited 6/12/00) < http://www.sanwabank.co.J. P. Sumner, Esq./contents.html >						
F	Financial Service Department (visited 6/12/00) < http://www.rsco.com/financial_services/priv_client_svcs.htm >						
G	Private Banking Services (visited 6/12/00) < http://www.fleet.com/bkpppb.html >						
H	PNC Advisors (visited 6/12/00) < http://www.pncadvisors.com/index.cfm >						
I	Northern Trust (visited 6/12/00) < http://www.northernttrust.com/personal_services/index.html >						
J	Mellon Private Banking (visited 6/12/00) < http://www.mellon.com/personal/private >						
K	Julius Baer - The Fine Art of Private Banking (visited 6/12/00) < http://www.juliusbaer.com/priv_bank/r2.html >						
L							
M							
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O							
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S							
T							
EXAMINER <i>Oliver Charles</i>		DATE CONSIDERED <i>8/18/02</i>					
*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609; Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.							